

RED MEAT PER CAPITA CONSUMPTION

Per capita red meat consumption declined in most of the developed countries in 1973 because of record cattle prices, which caused producers to retain breeding animals to increase production. The situation was further aggravated in the last half of the year by a slowdown in income growth and consumer purchasing power which limited demand for red meat, especially beef.

In some of the developing countries per capita consumption increased because of higher production as well as programs to make more meat available for domestic consumption as in Brazil. In other developing countries per capita consumption was down because of higher prices and lower production.

Beef and Veal

U.S. per capita consumption fell to 51 kilograms (kg) per capita, compared to 54 kg in 1972 because of reduced domestic production and high retail prices. In the European Community (EC) per capita beef and veal consumption was unchanged in 1973 at 25 kg per capita. This level of consumption has remained almost constant since 1969. In most other areas of the world consumption of beef and veal remained unchanged or declined because of the sharp price increase in beef during 1972-1973. In Argentina, Brazil, and Australia beef consumption was up because of higher levels of domestic production.

U.S. per capita consumption in 1973 was 28 kg per capita compared to 31 kg in 1972. The decline was due to reduced domestic pork production. In the EC per capita consumption declined for the first time since the formation of the Common Market. Per capita consumption fell from 30 kg per capita to 29 kg after 5 years of increases in per capita consumption. High retail prices and low production were the main reasons for the

decline. Per capita consumption in Canada was down from 28 kg to 26 kg, while it was up from 24 kg to 28 kg in Taiwan.

Sheep, Lamb, and Goat Meat

Sheep meat consumption in all the major consuming countries except New Zealand declined during 1973 because high wool prices caused producers to reduce slaughter. World wool prices now are declining and sheep slaughter in 1974 will increase. This should cause an increase in per capita sheep meat consumption in 1974.

Outlook for 1974

In 1974, red meat production has increased in the U.S., Japan, Canada, and Western Europe. High world grain prices and low livestock prices have encouraged increased marketing of livestock by farmers in order to cut losses. However, retail prices remain high in Europe, Japan, and Canada because of increased marketing margins and price support policies. In Japan, Spain, and the EC, the price support policies have caused a sharp increase in surplus meat supplies held at government expense and have caused the governments to either embargo or limit imports in order to reduce stocks and support domestic livestock prices.

Per capita meat consumption in 1974 is expected to increase because of higher production in the major importing countries, but not to levels that would be expected under a "free market", because retail prices remain high and imports have been limited. In the major exporting countries per capita consumption is expected to increase because of rising production and reduced demand in the EC, Japan, and Western Europe and North America.

1/
 Beef and veal: Per capita consumption in specified countries,
 average 1965-69, annual 1969-73
 (Kilos)

| Continent and country | Average 1965-69 | 1969 | 1970 | 1971 | 1972 | <u>2/</u> 1973 |
|--------------------------------|-----------------|------|------|------|-------------|----------------|
| North America: | | | | | | |
| Canada | 43 | 44 | 43 | 42 | 43 | 43 |
| Costa Rica | 11 | 10 | 10 | 11 | 10 | 11 |
| Dominican Republic | 6 | 6 | 6 | 7 | 6 | 6 |
| El Salvador | 7 | 6 | 6 | 6 | 5 | 6 |
| Guatemala | 8 | 8 | 8 | 8 | 8 | 7 |
| Honduras | 6 | 5 | 5 | 7 | 6 | 5 |
| Mexico | 10 | 10 | 11 | 10 | 10 | 11 |
| Nicaragua | 13 | 14 | 13 | 15 | 14 | 14 |
| Panama | 21 | 22 | 22 | 24 | 24 | 24 |
| United States | 50 | 52 | 53 | 53 | 54 | 51 |
| South America: | | | | | | |
| Argentina | 82 | 92 | 82 | 65 | 62 | 67 |
| Brazil | 18 | 19 | 18 | 17 | 18 | 22 |
| Chile | 19 | 19 | 20 | 18 | 16 | 12 |
| Colombia | 18 | 19 | 19 | 21 | 18 | 15 |
| Paraguay | 40 | 39 | 41 | 32 | 29 | 21 |
| Peru | 8 | 9 | 9 | 8 | 7 | 6 |
| Uruguay | 66 | 42 | 59 | 63 | 49 | 49 |
| Venezuela | 20 | 21 | 19 | 20 | 19 | 19 |
| Europe: | | | | | | |
| Western: | | | | | | |
| EC: | | | | | | |
| Belgium-Luxembourg | 25 | 27 | 28 | 28 | 28 | 28 |
| Denmark | 20 | 21 | 21 | 20 | 18 | 16 |
| France | 30 | 30 | 30 | 29 | 29 | 28 |
| Germany, West | 23 | 24 | 25 | 25 | 24 | 23 |
| Ireland | 16 | 17 | 18 | 20 | 20 | 15 |
| Italy | 20 | 24 | 26 | 26 | 25 | 28 |
| Netherlands | 19 | 19 | 20 | 19 | 17 | 18 |
| United Kingdom | 24 | 24 | 25 | 25 | 24 | 23 |
| EC average | 23 | 25 | 26 | 26 | 25 | 25 |
| Austria | 21 | 22 | 23 | 23 | 22 | 22 |
| Finland | 20 | 21 | 21 | 21 | 22 | 23 |
| Greece | 13 | 16 | 18 | 16 | 15 | 18 |
| Norway | 15 | 15 | 14 | 15 | 15 | 15 |
| Portugal | 9 | 10 | 11 | 12 | 12 | 12 |
| Spain | 10 | 11 | 12 | 11 | 11 | 13 |
| Sweden | 19 | 19 | 19 | 17 | 16 | 17 |
| Switzerland | 25 | 26 | 27 | 27 | 25 | 26 |
| Eastern: | | | | | | |
| Bulgaria | 11 | 11 | 11 | 10 | 11 | 11 |
| Czechoslovakia | 18 | 19 | 19 | 22 | 23 | 23 |
| Hungary | 9 | 9 | 9 | 9 | 8 | 11 |
| Poland | 14 | 16 | 16 | 15 | 15 | 15 |
| Yugoslavia | 10 | 10 | 11 | 12 | 10 | 12 |
| USSR | 19 | 21 | 21 | 21 | 22 | 22 |
| Africa: | | | | | | |
| South Africa, Republic of .. | 23 | 23 | 22 | 23 | 24 | 24 |
| Asia: | | | | | | |
| China, Republic of (Taiwan) .. | 1 | 1 | 1 | 1 | <u>3/</u> 2 | <u>3/</u> 2 |
| Iran | 2 | 2 | 2 | 2 | | |
| Israel | 18 | 19 | 19 | 19 | 10 | 7 |
| Japan | 2 | 2 | 3 | 3 | 4 | 4 |
| Philippines | 3 | 3 | 2 | 2 | 2 | 2 |
| Turkey | 5 | 5 | 5 | 5 | 4 | 4 |
| Oceania: | | | | | | |
| Australia | 44 | 43 | 41 | 42 | 43 | 46 |
| New Zealand | 53 | 52 | 44 | 39 | 52 | 47 |

1/ Carcass weight basis. 2/ Preliminary. 3/ Less than 500 grams.

1/
Pork: Per capita consumption in specified countries,
average 1965-69, annual 1969-73
(Kilos)

| Continent and country | Average 1965-69 | 1969 | 1970 | 1971 | 1972 | 2/ 1973 |
|---|-----------------|------|------|------|------|------------|
| North America: | | | | | | |
| Canada | 24 | 25 | 27 | 30 | 28 | 26 |
| Costa Rica | 3 | 3 | 4 | 4 | 4 | 4 |
| Dominican Republic | 2 | 2 | 3 | 3 | 4 | 4 |
| El Salvador | 4 | 3 | 3 | 3 | 3 | 3 |
| Guatemala | 2 | 2 | 2 | 2 | 2 | 2 |
| Honduras | 3 | 3 | 3 | 3 | 3 | 3 |
| Mexico | 6 | 6 | 6 | 7 | 7 | 7 |
| Nicaragua | 7 | 8 | 8 | 8 | 8 | 8 |
| Panama | 4 | 4 | 5 | 5 | 4 | 5 |
| United States | 28 | 29 | 30 | 33 | 31 | 28 |
| South America: | | | | | | |
| Argentina | 9 | 9 | 9 | 10 | 9 | 10 |
| Brazil | 6 | 7 | 7 | 6 | 6 | 7 |
| Chile | 4 | 4 | 4 | 4 | 6 | 5 |
| Colombia | 4 | 4 | 4 | 4 | 4 | 4 |
| Paraguay | --- | --- | --- | --- | --- | --- |
| Peru | 4 | 4 | 3 | 4 | 3 | 3 |
| Uruguay | 8 | 9 | 8 | 6 | 6 | 8 |
| Venezuela | 4 | 5 | 4 | 4 | 4 | 4 |
| Europe: | | | | | | |
| Western: | | | | | | |
| EC: | | | | | | |
| Belgium-Luxembourg | 28 | 29 | 31 | 31 | 36 | 37 |
| Denmark | 38 | 35 | 40 | 36 | 40 | 47 |
| France | 27 | 28 | 28 | 30 | 30 | 30 |
| Germany, West | 35 | 36 | 38 | 41 | 42 | 40 |
| Ireland | 27 | 27 | 30 | 30 | 30 | 30 |
| Italy | 10 | 11 | 13 | 14 | 15 | 16 |
| Netherlands | 25 | 25 | 25 | 29 | 29 | 26 |
| United Kingdom | 28 | 28 | 28 | 30 | 29 | 28 |
| EC average | 26 | 26 | 27 | 29 | 30 | 29 |
| Austria | 36 | 37 | 37 | 38 | 40 | 41 |
| Finland | 17 | 18 | 21 | 22 | 23 | 26 |
| Greece | 6 | 6 | 6 | 8 | 8 | 11 |
| Norway | 17 | 18 | 18 | 19 | 19 | 19 |
| Portugal | 10 | 11 | 10 | 12 | 14 | 15 |
| Spain | 12 | 13 | 15 | 14 | 16 | 18 |
| Sweden | 25 | 26 | 27 | 29 | 28 | 27 |
| Switzerland | 28 | 30 | 31 | 32 | 33 | 34 |
| Eastern: | | | | | | |
| Bulgaria | 16 | 14 | 13 | 16 | 19 | 17 |
| Czechoslovakia | 31 | 31 | 33 | 35 | 36 | 36 |
| Hungary | 30 | 29 | 32 | 32 | 38 | 34 |
| Poland | 25 | 24 | 24 | 28 | 30 | 33 |
| Yugoslavia | 17 | 16 | 17 | 21 | 19 | 19 |
| USSR | 13 | 12 | 13 | 15 | 15 | 14 |
| Africa: | | | | | | |
| South Africa, Republic of ... | 3 | 4 | 4 | 4 | 4 | 4 |
| Asia: | | | | | | |
| China, Republic of (Mao-tse-tung) | 20 | 21 | 23 | 24 | 24 | 28 |
| Iran | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ |
| Israel | --- | --- | --- | --- | --- | --- |
| Japan | 5 | 5 | 6 | 7 | 8 | 9 |
| Philippines | 10 | 11 | 10 | 10 | 10 | 9 |
| Turkey | 3/ | 3/ | 3/ | 3/ | 3/ | 3/ |
| Oceania: | | | | | | |
| Australia | 12 | 10 | 14 | 14 | 15 | 16 |
| New Zealand | 14 | 13 | 14 | 13 | 14 | 10 |

1/ Carcass weight basis. 2/ Preliminary. 3/ Less than 500 grams.

1/
 Mutton, lamb, and goat meat: Per capita consumption in specified countries,
 average 1965-69, annual 1969-73
 (Kilos)

| Continent and country | Average 1965-69 | 1969 | 1970 | 1971 | 1972 | 1973 | <u>2/</u> |
|---------------------------------|-----------------|----------|----------|----------|----------|----------|-----------|
| North America: | | | | | | | |
| Canada | 2 | 3 | 3 | 2 | 3 | 2 | 2 |
| Costa Rica | --- | --- | --- | --- | --- | --- | --- |
| Dominican Republic | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| El Salvador | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| Guatemala | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| Honduras | --- | --- | --- | --- | --- | --- | 1 |
| Mexico | 1 | 1 | 1 | 1 | 1 | 1 | --- |
| Nicaragua | --- | --- | --- | --- | --- | --- | --- |
| Panama | 3/ 2 | 3/ 2 | 3/ 1 | 3/ 1 | 3/ 1 | 3/ 1 | 3/ 1 |
| United States | --- | --- | --- | --- | --- | --- | --- |
| South America: | | | | | | | |
| Argentina | 6 | 6 | 5 | 7 | 5 | 4 | 4 |
| Brazil | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Chile | 3 | 3 | 2 | 3 | 2 | 4 | 4 |
| Colombia | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| Paraguay | --- | --- | --- | --- | --- | --- | 2 |
| Peru | 3 | 3 | 3 | 3 | 2 | 2 | 2 |
| Uruguay | 23 | 27 | 22 | 24 | 16 | 9 | 9 |
| Venezuela | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| Europe: | | | | | | | |
| Western: | | | | | | | |
| EC: | | | | | | | |
| Belgium-Luxembourg | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Denmark | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| France | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Germany, West | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| Ireland | 11 | 11 | 11 | 11 | 11 | 10 | 10 |
| Italy | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Netherlands | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| United Kingdom | 11 | 10 | 10 | 11 | 10 | 10 | 10 |
| EC average | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Austria | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| Finland | 3/ 3/ | 3/ 3/ | 14 | 17 | 16 | 16 | 16 |
| Greece | 13 | 13 | 14 | 17 | 16 | 16 | 16 |
| Norway | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| Portugal | 1 | 2 | 2 | 1 | 1 | 1 | 1 |
| Spain | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| Sweden | 3/ 3/ | 3/ 3/ | 1 | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| Switzerland | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Eastern: | | | | | | | |
| Bulgaria | 10 | 10 | 10 | 10 | 10 | 11 | 11 |
| Czechoslovakia | 3/ 3/ | 3/ 3/ | 1 | 1 | 1 | 1 | 1 |
| Hungary | 1 | 1 | 1 | 3/ 3/ | 3/ 3/ | 3/ 3/ | 3/ 3/ |
| Poland | 1 | 1 | 1 | 1 | 1 | 2 | 2 |
| Yugoslavia | 3 | 3 | 2 | 3 | 3 | 3 | 2 |
| USSR | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| Africa: | | | | | | | |
| South Africa, Republic of | 8 | 8 | 11 | 10 | 6 | 5 | 5 |
| Asia: | | | | | | | |
| China, Republic of (Taiwan)... | 3/ 7 | 3/ 8 | 3/ 7 | 3/ 7 | 3/ 7 | 3/ 7 | 3/ 7 |
| Iran | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Israel | 1 | 2 | 2 | 2 | 2 | 2 | 2 |
| Japan | 1 | 2 | 2 | 2 | 2 | 2 | 2 |
| Philippines | 3/ 9 | 3/ 9 | 3/ 10 | 3/ 10 | 3/ 8 | 3/ 9 | 3/ 9 |
| Turkey | 9 | 9 | 10 | 10 | 8 | 9 | 9 |
| Oceania: | | | | | | | |
| Australia | 38 | 40 | 39 | 43 | 38 | 28 | 28 |
| New Zealand | 35 | 23 | 35 | 29 | 30 | 32 | 32 |

1/ Carcass weight basis. 2/ Preliminary. 3/ Less than 500 grams.

1/
 Total meat: Per capita consumption in specified countries,
 average 1965-69, annual 1969-73
 (Kilos)

| Continent and country | Average 1965-69 | 1969 | 1970 | 1971 | 1972 | <u>2/</u> 1973 |
|--------------------------------|-----------------|------|------|------|------|----------------|
| North America: | | | | | | |
| Canada | 69 | 72 | 73 | 74 | 74 | 71 |
| Costa Rica | 14 | 13 | 14 | 15 | 14 | 15 |
| Dominican Republic | 8 | 8 | 9 | 10 | 10 | 10 |
| El Salvador | 11 | 9 | 9 | 9 | 8 | 9 |
| Guatemala | 10 | 10 | 10 | 10 | 10 | 9 |
| Honduras | 9 | 8 | 8 | 10 | 9 | 8 |
| Mexico | 17 | 17 | 18 | 18 | 18 | 19 |
| Nicaragua | 20 | 22 | 21 | 23 | 22 | 22 |
| Panama | 25 | 26 | 27 | 29 | 28 | 29 |
| United States | 80 | 83 | 84 | 87 | 86 | 80 |
| South America: | | | | | | |
| Argentina | 97 | 107 | 96 | 82 | 76 | 81 |
| Brazil | 25 | 27 | 26 | 24 | 25 | 30 |
| Chile | 26 | 26 | 26 | 25 | 24 | 21 |
| Colombia | 22 | 23 | 23 | 25 | 22 | 19 |
| Paraguay | 40 | 39 | 41 | 32 | 29 | 21 |
| Peru | 15 | 16 | 15 | 15 | 12 | 11 |
| Uruguay | 97 | 78 | 89 | 93 | 71 | 66 |
| Venezuela | 24 | 26 | 23 | 24 | 23 | 23 |
| Europe: | | | | | | |
| Western: | | | | | | |
| EC: | | | | | | |
| Belgium-Luxembourg | 57 | 60 | 64 | 63 | 68 | 70 |
| Denmark | 58 | 56 | 61 | 56 | 58 | 63 |
| France | 62 | 63 | 63 | 64 | 64 | 63 |
| Germany, West | 58 | 60 | 63 | 66 | 66 | 53 |
| Ireland | 57 | 55 | 59 | 61 | 61 | 55 |
| Italy | 32 | 37 | 41 | 42 | 42 | 46 |
| Netherlands | 46 | 46 | 47 | 50 | 48 | 46 |
| United Kingdom | 63 | 62 | 63 | 66 | 63 | 59 |
| EC average | 53 | 55 | 57 | 59 | 59 | 58 |
| Austria | 57 | 59 | 60 | 61 | 62 | 63 |
| Finland | 38 | 40 | 43 | 44 | 46 | 50 |
| Greece | 32 | 35 | 38 | 41 | 39 | 45 |
| Norway | 38 | 39 | 37 | 39 | 39 | 39 |
| Portugal | 20 | 23 | 23 | 25 | 27 | 28 |
| Spain | 26 | 28 | 31 | 29 | 31 | 35 |
| Sweden | 45 | 46 | 48 | 47 | 45 | 46 |
| Switzerland | 55 | 58 | 60 | 61 | 60 | 62 |
| Eastern: | | | | | | |
| Bulgaria | 37 | 35 | 34 | 36 | 40 | 39 |
| Czechoslovakia | 49 | 50 | 53 | 58 | 60 | 60 |
| Hungary | 40 | 39 | 42 | 41 | 46 | 45 |
| Poland | 40 | 41 | 41 | 44 | 46 | 49 |
| Yugoslavia | 30 | 29 | 30 | 36 | 32 | 33 |
| USSR | 36 | 37 | 38 | 40 | 41 | 40 |
| Africa: | | | | | | |
| South Africa, Republic of | 34 | 35 | 37 | 37 | 34 | 33 |
| Asia: | | | | | | |
| China, Republic of (Taiwan)... | 21 | 22 | 24 | 25 | 24 | 28 |
| Iran | 9 | 10 | 9 | 9 | 9 | 9 |
| Israel | 19 | 20 | 20 | 20 | 11 | 8 |
| Japan | 8 | 9 | 12 | 12 | 15 | 16 |
| Philippines | 13 | 14 | 12 | 12 | 12 | 11 |
| Turkey | 14 | 14 | 15 | 15 | 12 | 13 |
| Oceania: | | | | | | |
| Australia | 94 | 93 | 94 | 99 | 96 | 90 |
| New Zealand | 102 | 88 | 93 | 81 | 96 | 89 |

1/ Carcass weight basis; includes horse meat. 2/ Preliminary.

WORLD COTTON SUPPLY AND DEMAND SITUATION

The world cotton situation in 1974-75 (August-July) is characterized by the first essentially unchanged production prospects in 4 years and the first drop in total consumption in 6 years. Although the anticipated world crop is about unchanged, larger beginning stocks put world supplies this season at a new high of 88 million bales (480 lb net). This record supply, however, will not be matched by a commensurate increase in demand.

In spite of the stockbuilding activity abroad that accompanied the significant consumption increases of the past three seasons, the fall off in world trade anticipated during the current season is expected to roughly parallel the downturn in total consumption. The effect of the trade currently anticipated reflects the fact that importing countries presently appear inclined to hold stocks at the level on hand at the beginning of this season (August 1, 1974), while stocks in producing countries will likely increase—continuing the trend of the past 3 years. This latter trend is a reflection of the intention to match planned increases in domestic consumption with adequate stocks as well as last season's unusual stock buildup, that resulted from export restrictions. The net result should be a fourth consecutive yearly increase in world stocks. More than half of the increase this season is expected in the United States.

Strong demand last season and generally favorable prices throughout most of the crop year prompted farmers to expand cotton area. However, the decline in prices at the start of calendar 1974, plus rising production costs, fears of a downturn in economic activity, and prospects for continuing inflation, reduced demand for cotton and blunted acreage increases. In addition, average yield this season is down slightly, reflecting adverse weather conditions in such major producing countries as the United States, India, Turkey, and Brazil, as well as tighter fertilizer and insecticide supplies—a supply and cost problem exacerbated by the demands of increasingly profitable food crops.

Total world cotton production currently is placed at 62.2 million bales, almost unchanged from last year's output. The marginal increase of roughly 240,000 bales over the 1973-74 harvest is the result of an 825,000 bale increase in foreign non-Communist countries and an increase of 320,000 bales in Communist production, offset by a drop of 905,000 bales in the U.S. crop, forecast as of November 1 at 12.1 million bales. The major increase expected in Communist production will occur in the USSR, a crop of 12.1 million bales is anticipated—a record for the fifth consecutive year.

Among foreign non-Communist producing countries, the anticipated increase to 28 million bales largely reflects increased production in Mexico, Argentina, Bolivia, Colombia, Spain, Nigeria, Pakistan, Uganda, and Turkey, only partly offset by decreases in the Sudan, Egypt, Brazil, Nicaragua, and Guatemala.

The current downturn in economic activity, increasing unemployment, and chronic inflation already have begun to take their toll on world consumption. During the current marketing year, the uptrend of the past 7 years apparently will be reversed. The extent of the downturn, now placed at 1 million bales for a world total of slightly over 60 million, is still somewhat unclear. Improved economic activity, as well as a further decline in offtake, will be necessary to relieve the current outlook. The anticipated decline in consumption will take place mainly in the U.S., where consumption of 6.6 million bales is expected to be 12 percent below last season's 7.5 million, and almost 20 percent below the 1968-72 average of 8.1 million.

A decrease in offtake will also occur in foreign non-Communist importing countries, where a drop of 800,000 bales will put this season's level at 19.7 million bales. The drop is expected to be more acute in Asia, but several European countries also are likely to be affected. The same downturn in economic activity and consumer buying power that has adversely affected the importing countries' textile export-oriented expansion plans also will halt the long-term upward trend in cotton consumption among net exporting non-Communist countries. Over the past few years, several such countries—most notably Brazil, Pakistan, Turkey, and Mexico—have increasingly stressed production and export of textiles manufactured from locally grown cotton. Only in Communist countries is any increase expected in 1974-75, up 3 percent to 23.5 million bales.

World trade in raw cotton in 1974-75 will reflect the current lack of inquiries for yarn and textiles and significant raw cotton stocks in most consuming countries. A continuation of the downtrend in trade from the 1972-73 peak of 20.6 million bales is expected, placing this season's total at about 18.6 million. Prospects for U.S. exports are down sharply. Current estimates place the U.S. total at 4.3 million bales, down nearly 2 million bales from last season's exports. Foreign non-Communist exports are forecast at 11.3 million bales, up from the level last season, when export restrictions held total exports well below potential levels, but some 700,000 bales below the 1968-72 average of 12

million. The potential exists for some fluctuation in total trade this season, depending on the overall economic situation and pricing policies that may develop in response to this situation.

The downturn in prices that has characterized the market since the textile recession in early calendar 1974 has been fairly steady, for a brief summer period when drought on the High Plains of Texas and rising grain prices temporarily halted the decline. On November 7, 1974, the c.i.f. Northern European quote for U.S. SM 1-1/16 inch raw cotton was 54.85 and the Index 'A' stood at 51.10. The evident spread between these two

quotations has been characteristic of the market since about July and primarily reflects two separate aspects of the cotton market situation. First, the basis for most foreign competing growths has been generally cheaper because of abundant supplies abroad; and second, U.S. quotations have been sustained above Index 'A' by the New York futures price, influenced by action in the grain markets. November 15 prices on the U.S. spot market for the three growths quoted in cents per pound were: 34.57 for Middling 15/16 inches; 40.75 for Middling 1-1/16 inches; and 38.61 for Strict Low Middling (SLM) 1-1/16 inches. Futures prices for No. 2 contracts on the same day for SLM 1-1/16 inches varied between 40.25 cents for December 1974 and 46.90 cents for May 1976 contracts.

COTTON: World stocks, production, consumption, and exports by areas,
seasons beginning August 1

| | | (In millions of bales of 480 lb net) | | | | | | | |
|---------------------------|------|---|------|------|-----------------|------|------|-----------------------|------|
| Item and Area | | 1965-66:1966-67:1967-68:1968-69:1969-70:1970-71:1971-72:1972-73:Prelim- | | | 1973-74:1974-75 | | | Fore- inary : cast | |
| Beginning stocks | | : | | | : | | | : | |
| United States | 14.3 | 16.9 | 12.5 | 6.5 | 6.5 | 5.8 | 4.3 | 3.3 | 4.1 |
| Foreign non-Communist | 4.5 | 4.8 | 4.9 | 5.7 | 7.3 | 7.5 | 6.3 | 7.1 | 7.8 |
| Exporting countries | 5.9 | 5.6 | 6.0 | 6.6 | 6.0 | 5.7 | 5.5 | 6.1 | 7.1 |
| Importing countries | 3.9 | 4.0 | 4.0 | 4.3 | 4.0 | 3.2 | 4.8 | 5.8 | 5.8 |
| Communist countries | 14.3 | 14.4 | 14.9 | 16.6 | 17.3 | 16.4 | 16.6 | 19.0 | 20.7 |
| Foreign total | 28.6 | 31.3 | 27.4 | 23.1 | 23.8 | 22.2 | 20.9 | 22.3 | 24.8 |
| World total 1/ | 28.6 | 31.3 | 27.4 | 23.1 | 23.8 | 22.2 | 20.9 | 22.3 | 25.8 |
| <u>Production</u> | | | | | | | | | |
| United States 2/ | 14.8 | 9.9 | 7.2 | 11.0 | 10.0 | 10.4 | 10.4 | 13.7 | 13.1 |
| Foreign non-Communist | 23.6 | 22.8 | 24.0 | 26.2 | 26.0 | 23.4 | 28.1 | 28.2 | 27.2 |
| Communist countries | 16.4 | 17.9 | 18.2 | 17.5 | 17.0 | 19.9 | 20.6 | 19.5 | 21.8 |
| Foreign total | 40.0 | 40.7 | 42.2 | 43.7 | 43.0 | 43.3 | 48.7 | 47.7 | 50.1 |
| World total | 54.8 | 50.6 | 49.4 | 54.7 | 53.0 | 53.7 | 59.1 | 61.4 | 62.1 |
| <u>Consumption</u> | | | | | | | | | |
| United States | 9.5 | 9.5 | 9.0 | 8.2 | 8.0 | 8.1 | 8.2 | 7.8 | 7.5 |
| Foreign non-Communist | 6.7 | 6.9 | 7.1 | 7.6 | 8.2 | 8.4 | 8.7 | 9.5 | 10.3 |
| Exporting countries | 18.2 | 18.5 | 18.6 | 19.0 | 19.0 | 19.0 | 19.4 | 19.7 | 20.5 |
| Importing countries | 18.1 | 19.4 | 19.0 | 19.2 | 19.5 | 20.3 | 21.1 | 21.9 | 22.8 |
| Communist countries | 43.0 | 44.8 | 44.7 | 45.8 | 46.7 | 47.7 | 49.2 | 51.1 | 53.6 |
| Foreign total | 52.5 | 54.3 | 53.7 | 54.0 | 54.7 | 55.8 | 57.4 | 58.9 | 60.1 |
| World total | 52.5 | 54.3 | 53.7 | 54.0 | 54.7 | 55.8 | 57.4 | 58.9 | 60.1 |
| <u>Exports</u> | | | | | | | | | |
| United States | 3.0 | 4.8 | 4.4 | 2.8 | 2.9 | 3.9 | 3.4 | 5.3 | 6.1 |
| Foreign non-Communist 3/ | 11.6 | 10.8 | 10.4 | 11.6 | 12.3 | 11.4 | 12.3 | 12.2 | 10.0 |
| Communist countries | 2.2 | 2.4 | 2.6 | 2.4 | 2.4 | 2.6 | 2.9 | 3.1 | 3.4 |
| Foreign total | 13.8 | 13.2 | 13.0 | 14.0 | 14.7 | 14.0 | 15.2 | 15.3 | 13.4 |
| World total | 16.8 | 18.0 | 17.4 | 16.8 | 17.6 | 17.9 | 18.6 | 20.6 | 19.5 |
| Non-Communist net exports | 1.7 | 1.5 | 1.0 | 1.4 | 1.7 | 2.0 | 1.6 | 2.4 | 1.8 |
| to Communist | 1.7 | 1.5 | 1.0 | 1.4 | 1.7 | 2.0 | 1.6 | 2.4 | 1.8 |

1/ Excludes cotton afloat, in transit, and in free ports.

2/ In-season ginnings imports plus city crop.

3/ Includes small quantities reexported.

COTTON: World stocks, production, consumption, and exports by areas,
seasons beginning August 1

| | | (In millions of bales of 480 lb net) | | | | | | | |
|---------------------------|------|--------------------------------------|---------|---------|---------|---------|---------|---------|---------|
| Item and Area | | 1965-66 | 1966-67 | 1967-68 | 1968-69 | 1969-70 | 1970-71 | 1971-72 | 1972-73 |
| Beginning stocks | | | | | | | | | |
| United States | 14.3 | 16.9 | 12.5 | 6.5 | 6.5 | 5.8 | 4.3 | 3.3 | 4.1 |
| Foreign non-Communist | 4.5 | 4.8 | 4.9 | 5.7 | 7.3 | 7.5 | 6.3 | 7.1 | 7.8 |
| Exporting countries | 5.9 | 5.6 | 6.0 | 6.6 | 6.0 | 5.7 | 5.5 | 6.1 | 7.1 |
| Importing countries | 3.9 | 4.0 | 4.0 | 4.3 | 4.0 | 3.2 | 4.8 | 5.8 | 5.8 |
| Communist countries | | | | | | | | | 6.6 |
| Foreign total | 14.3 | 14.4 | 14.9 | 16.6 | 17.3 | 16.4 | 16.6 | 19.0 | 20.7 |
| World total 1/ | 28.6 | 31.3 | 27.4 | 23.1 | 23.8 | 22.2 | 20.9 | 22.3 | 24.8 |
| Production | | | | | | | | | |
| United States 2/ | 14.8 | 9.9 | 7.2 | 11.0 | 10.0 | 10.4 | 10.4 | 13.7 | 13.1 |
| Foreign non-Communist | 23.6 | 22.8 | 24.0 | 26.2 | 26.0 | 23.4 | 28.1 | 28.2 | 27.2 |
| Communist countries | 16.4 | 17.9 | 18.2 | 17.5 | 17.0 | 19.9 | 20.6 | 19.5 | 21.8 |
| Foreign total | 40.0 | 40.7 | 42.2 | 43.7 | 43.0 | 43.3 | 48.7 | 47.7 | 50.1 |
| World total | 54.8 | 50.6 | 49.4 | 54.7 | 53.0 | 53.7 | 59.1 | 61.4 | 62.1 |
| Consumption | | | | | | | | | |
| United States | 9.5 | 9.5 | 9.0 | 8.2 | 8.0 | 8.1 | 8.2 | 7.8 | 7.5 |
| Foreign non-Communist | 6.7 | 6.9 | 7.1 | 7.6 | 8.2 | 8.4 | 8.7 | 9.5 | 10.3 |
| Exporting countries | 18.2 | 18.5 | 18.6 | 19.0 | 19.0 | 19.0 | 19.4 | 19.7 | 20.5 |
| Importing countries | 18.1 | 19.4 | 19.0 | 19.2 | 19.5 | 20.3 | 21.1 | 21.9 | 22.8 |
| Communist countries | | | | | | | | | 23.5 |
| Foreign total | 43.0 | 44.8 | 44.7 | 45.8 | 46.7 | 47.7 | 49.2 | 51.1 | 53.6 |
| World total | 52.5 | 54.3 | 53.7 | 54.0 | 54.7 | 55.8 | 57.4 | 58.9 | 60.1 |
| Exports | | | | | | | | | |
| United States | 3.0 | 4.8 | 4.4 | 2.8 | 2.9 | 3.9 | 3.4 | 5.3 | 6.1 |
| Foreign non-Communist 3/ | 11.6 | 10.8 | 10.4 | 11.6 | 12.3 | 11.4 | 12.3 | 12.2 | 10.0 |
| Communist countries | 2.2 | 2.4 | 2.6 | 2.4 | 2.4 | 2.6 | 2.9 | 3.1 | 3.4 |
| Foreign total | 13.8 | 13.2 | 13.0 | 14.0 | 14.7 | 14.0 | 15.2 | 15.3 | 13.4 |
| World total | 16.8 | 18.0 | 17.4 | 16.8 | 17.6 | 17.9 | 18.6 | 20.6 | 19.5 |
| Non-Communist net exports | | | | | | | | | 18.6 |
| to Communist | 1.7 | 1.5 | 1.0 | 1.4 | 1.7 | 2.0 | 1.6 | 2.4 | 1.8 |

1/ Excludes cotton afloat, in transit, and in free ports.

2/ In-season ginnings imports plus city crop.

3/ Includes small quantities re-exported.

November 14, 1974

WORLD WALNUT CROP DOWN

With a 19 percent decline in walnut output in the United States and 35 percent decline in France, the 1974 world walnut harvest currently is estimated at 186,000 metric tons (inshell basis), down 21 percent from the record 1973 crop of 234,000 tons. However, this year's crop still represents the second largest on record. Production and trade data are unavailable for the Peoples' Republic of China.

Plagued by bad weather, foreign walnut production in 1974 now is estimated at 58,000 metric tons (inshell basis), down 24 percent from that of a year earlier. France, the largest foreign walnut producer, expects a harvest of about 19,000 tons, compared to 29,300 tons in 1973. Frost damage in the principal producing regions (Bordeaux and Grenoble) was the main reason for the decline in output. Italy's crop, also beset by cold, wet spring weather, is expected to be about 15,000 tons, 25 percent less than the 1973 level. Both countries reported quality as good. The Indian crop is estimated at 10,000 tons, down 3,500 tons from the 1973 crop. The decline is also attributed to adverse weather.

Walnut production in Iran is presently estimated at about 3,000 metric tons, slightly less than the 3,200 tons of 1973. The small decrease is attributed to illegal cuttings of walnut trees. In Turkey, the 1974 commercial

walnut crop is expected to total about 11,000 tons, 1,000 above the 1973 harvest.

U.S. 1974 production officially is estimated at 128,000 metric tons, compared to a record 158,000 tons in 1973. While this represents a decline of 19 percent from the 1973 level, it is still the second largest crop on record.

Exports by foreign producers for 1973-74 are placed at 28,000 metric tons (inshell basis), about 6 percent below the 1972-73 level of 30,000 tons. Walnut exports from the United States for the 1973-74 season amounted to a record 26,200 tons, up 72 percent from the 1972-73 level of 15,200 tons. For the fourth consecutive year, the U.S. was the largest exporter, followed by France, India, Italy, Turkey, and Iran. West Germany still remains the largest export market for the United States and France.

Foreign walnut prices (landed, duty paid London) have declined, compared to the trend a year ago, principally in response to dwindling consumer demand and a record 1973 world crop. In October 1974, French Bordeaux extra halves were quoted at \$1.48 a pound, down 44 percent from the price a year ago. The October quotation for Turkish light halves was \$1.30 per pound, compared to \$1.51 per pound during the same month in 1973. Chinese light halves were quoted at \$.98 per pound in October, compared to \$1.06 per pound a year earlier.

WALNUTS, INSHELL: Production in specified countries
 annual 1970-74
 (In thousands of metric tons 1/)

| Country | 1970 | 1971 | 1972 | 1973 | 1974 ^{2/} |
|---------------------|-------|-------|-------|-------|--------------------|
| FOREIGN: | | | | | |
| France | | | | | |
| France | 27.2 | 16.3 | 27.2 | 29.3 | 19.0 |
| India | 14.0 | 11.0 | 14.0 | 13.5 | 10.0 |
| Iran | 4.0 | 3.5 | 3.2 | 3.2 | 3.0 |
| Italy | 20.0 | 21.0 | 15.0 | 20.0 | 15.0 |
| Turkey | 10.0 | 8.0 | 11.0 | 10.0 | 11.0 |
| Total Foreign | 75.2 | 59.8 | 70.4 | 76.0 | 58.0 |
| United States | 101.4 | 123.7 | 106.0 | 158.0 | 128.0 |
| Total world | 176.6 | 183.5 | 176.4 | 234.0 | 186.0 |

1/ All tonnages have been converted to metric units; 1 metric ton is equivalent to 2204.6 pounds.

2/ Preliminary.

WALNUTS, INSHELL BASIS: Export from selected countries
 1969-73 marketing years 1/
 (In thousands of metric tons 2/)

| Country | 1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 ^{3/} |
|---------------------|---------|---------|---------|---------|-----------------------|
| FOREIGN: | | | | | |
| France | | | | | |
| France | 10.9 | 13.2 | 8.3 | 10.0 | 10.9 |
| India | 4.5 | 5.4 | 5.1 | 8.1 | 6.0 |
| Iran | 0.7 | 0.5 | 0.7 | 0.6 | 0.4 |
| Italy | 7.0 | 7.3 | 9.4 | 3.6 | 5.7 |
| Turkey | 5.5 | 4.6 | 4.2 | 7.7 | 5.0 |
| Total Foreign | 28.6 | 31.0 | 27.7 | 30.0 | 28.0 |
| United States | 6.5 | 9.4 | 17.1 | 15.2 | 26.2 |
| Grand total | 35.1 | 40.4 | 44.8 | 45.2 | 54.2 |

1/ Marketing year beginning October 1 in France, Italy, Turkey, and the United States, and September 23 in Iran.

2/ All tonnages have been converted to metric units; 1 metric ton is equivalent to 2204.6 pounds.

3/ Preliminary.

WALNUTS SHELLLED: Prices, landed, duty paid London,
 October average, 1971 to date
 (In U.S. cents per lb)

| Item | 1971 | 1972 | 1973 | 1974 |
|----------------------|---------------------|---------------------|-------|---------------------|
| France: | | | | |
| Bordeaux extra | 163.3 | 235.9 | 264.7 | 148.2 |
| Turkey: | | | | |
| Light halves | 103.0 ^{1/} | 159.2 ^{1/} | 150.8 | 129.8 ^{1/} |
| China: | | | | |
| Light halves | --- | 115.6 ^{1/} | 106.4 | 97.9 ^{2/} |

1/ Spot.

2/ Landed.

WORLD HOPS CROP DOWN

Led by an anticipated 13 percent decline in hops production in West Germany and a 9 percent decrease in the United Kingdom, the 1974 world hops harvest currently is estimated at 243.8 million pounds. This represents a 6 percent decrease from the record 1973 crop of 259.5 million pounds but would be about 6 percent above the 1972 harvest of 230.8 million pounds. Production in the United States registered an increase for the fifth consecutive year.

For the last 5 years, this report has shown an estimated 18.7 million pounds of hops production for the Soviet Union. While this may be an accurate estimate, it has been reported that the total USSR crop may be as much as one third higher than the current estimate for 1974. However, until this can be confirmed, this report will continue to carry the present estimate.

Total acreage rose slightly for the 1974 season, with an expansion of less than 1 percent in the five major producing countries. Acreage expansion in the United States registered the greatest increase. U.S. area planted to hops in 1974 amounted to 32,400 acres, up about 3 percent from 31,400 acres the previous year. While hops area in West Germany rose 1 percent to 49,808 acres, area planted to hops in the United Kingdom declined by 3 percent to a total of 16,227 acres. In Czechoslovakia, planted area rose slightly to total 21,843 acres, compared

to 21,826 acres from the previous year. Area planted to hops in Yugoslavia rose less than 1 percent to total 10,131 acres in 1974.

U.S. exports of whole hops totaled 14,803,807 pounds in 1973-74, with 3,364,680 pounds of hops extract being shipped for the same period. This compares with 16,408,106 pounds of whole hops and 4,281,604 pounds of extract exported during the 1972-73 marketing year.

Principal markets for U.S. whole hops were Brazil, Canada, Mexico, and the USSR, while Colombia and Mexico ranked as major outlets for U.S. hops extract. Although Canada, Mexico, and Brazil traditionally have been major markets for U.S. hops, the USSR only recently has emerged as a substantial purchaser of U.S. hops. The USSR imported 1,863,900 pounds of U.S. hops in the 1972-73 season and 1,997,793 pounds during the 1973-74 year. It is believed that 440,921 pounds of U.S. hops extract reported as exported to the USSR during 1973-74 were in fact hops exports.

U.S. imports of hops during the 1973-74 season registered an increase, while imports of hops extract decreased. Whole hops and hops extract imports totaled 14,141,847 pounds and 43,433 pounds respectively, compared to 13,044,684 pounds of hops and 3,484 pounds of extract during 1972-73.

HOPS: Production in specified countries
 Annual 1970-74 1/ 2/
 (In million pounds)

| Region and Country | 1970 | 1971 | 1972 | 1973 | 1974 <u>3/</u> |
|------------------------|--------------|--------------|--------------|--------------|----------------|
| NORTH AMERICA: | | | | | |
| Canada | 1.8 | 1.6 | 1.2 | 1.5 | 0.8 |
| United States | <u>45.9</u> | <u>49.7</u> | <u>51.3</u> | <u>54.8</u> | <u>57.0</u> |
| Total | <u>47.7</u> | <u>51.3</u> | <u>52.5</u> | <u>56.3</u> | <u>57.8</u> |
| WESTERN EUROPE: | | | | | |
| Austria | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 |
| Belgium | 4.3 | 5.1 | 4.3 | 4.4 | 5.0 |
| France | 5.0 | 4.1 | 4.3 | 5.4 | 4.0 |
| Germany, West | 59.0 | 53.5 | 66.9 | 84.3 | 73.0 |
| Spain | 3.3 | 2.5 | 4.6 | 5.2 | 5.0 |
| United Kingdom | <u>26.5</u> | <u>25.3</u> | <u>19.8</u> | <u>23.0</u> | <u>21.0</u> |
| Total | <u>98.4</u> | <u>90.8</u> | <u>100.2</u> | <u>122.6</u> | <u>108.3</u> |
| EASTERN EUROPE: | | | | | |
| Bulgaria | 1.3 | 1.3 | 1.3 | 1.3 | 1.0 |
| Czechoslovakia | <u>23.1</u> | <u>16.6</u> | <u>23.6</u> | <u>22.7</u> | <u>20.0</u> |
| Germany, East | 6.2 | 4.9 | 5.8 | 5.5 | 6.0 |
| Hungary | 0.7 | 0.5 | 0.6 | 0.7 | 0.7 |
| Poland | 5.3 | 4.2 | 5.7 | 7.1 | 6.0 |
| Romania | 1.2 | 1.2 | 1.2 | 1.2 | 1.2 |
| Yugoslavia | <u>11.6</u> | <u>9.7</u> | <u>11.0</u> | <u>12.2</u> | <u>12.0</u> |
| Total | <u>49.4</u> | <u>38.4</u> | <u>49.2</u> | <u>50.7</u> | <u>46.9</u> |
| Total Europe .. | <u>147.8</u> | <u>129.2</u> | <u>149.4</u> | <u>173.3</u> | <u>155.2</u> |
| Total USSR <u>4/</u> | <u>18.7</u> | <u>18.7</u> | <u>18.7</u> | <u>18.7</u> | <u>18.7</u> |
| OTHER: | | | | | |
| Australia | 4.4 | 3.9 | 4.1 | 4.7 | 5.0 |
| Japan | 5.5 | 5.4 | 5.1 | 5.6 | 5.0 |
| New Zealand | 1.0 | 1.1 | 0.9 | 0.8 | 2.0 |
| South Africa, Rep. of: | 0.2 | 0.2 | 0.1 | 0.1 | 0.1 |
| Total | <u>11.1</u> | <u>10.6</u> | <u>10.2</u> | <u>11.2</u> | <u>12.1</u> |
| World total | <u>225.3</u> | <u>209.8</u> | <u>230.8</u> | <u>259.5</u> | <u>243.8</u> |

1/ Year of harvest.

2/ Totals may not equal sum of parts due to rounding.

3/ Preliminary.

4/ Estimate.

WORLD SUGAR PRODUCTION UP

World production of centrifugal sugar for the 1974-75 crop year now is estimated at 80.9 million metric tons (89.1 million short tons), raw value basis. This is an alltime record, although adverse weather reduced outturns in several of the sugarbeet producing countries. This estimate represents a reduction from the November 11 report in **Foreign Agriculture** of 81.1 million metric tons. Production of beet sugar is likely to be down from the 1973-74 level by 1.6 million tons, but cane sugar production will likely be up by about 2 million tons. World consumption for 1974-75 probably will amount to about 81 million metric tons; therefore production and consumption will be about on balance. Carryover stocks will remain at relatively low levels.

Several of the major producing countries will have larger crops in 1974-75. Included among these are Brazil, the Republic of South Africa, Australia, and the Philippines. The West European countries, however, were particularly hard hit by adverse weather. Early in the growing season weather was cold and damp, and although conditions improved, the weather again hampered growth of sugarbeets late in the season and also impeded harvesting operations. Rains late in the season made it difficult to get harvesting machinery into the fields. The United Kingdom was particularly hard hit by bad weather and disease (virus yellows), and production will be down by almost one-third. A smaller beet sugar crop in the United States however, will be almost offset by higher output of cane sugar. Some U.S. sugarbeet acreage was diverted to other crops for 1974-75.

Hurricanes which hit the State of Louisiana and Central America did less damage to cane than earlier reports indicated. Hurricane Carmen in Louisiana blew much of the cane down, and reduced output somewhat, although much less than was earlier estimated. The effect of Hurricane Fifi, however, in several of the Central American countries was to supply much needed rain for cane growth.

Although sugarbeet acreage was up slightly in the USSR, cold and rainy weather early in the growing season and again at harvesttime has resulted in a lower outturn this year. Production for 1974-75 is estimated at 9 million tons, compared with 9.57 million tons for 1973-74. A cold summer in Poland resulted in low sugar content, and wet weather at the end of the season hampered harvest operations, but larger acreage and better beet yields will largely offset these factors.

Favorable weather and efforts to increase production are resulting in substantially larger crops in Australia and the Philippines. Despite some adverse weather Cuba is likely to have a small increase in production. India has experienced dry weather as well as a fertilizer shortage, and its sugarcane production is off. The 1974-75 centrifugal sugar production in India, however, is expected to be almost as large as output for 1973-74, as the Government is offering incentives to growers to channel cane to mills instead of using it in the production of noncentrifugal sugar.

World stocks on August 1, 1974, were placed at 25.8 million bales, up from 24.8 million a year earlier. The increase this season, to be around 28 million bales on August 1, 1975, largely is explained by the slowdown in offtake, coupled with essentially static production. During the 1974-75 season stock changes will be largest in the United States, where an increase to approximately 5.1 million bales is anticipated. An increase in stocks among foreign non-Communist exporting countries to over 9 million bales likely will be shared by all large exporting countries, with the possible exception of several in Central America. With the exception of several Asian countries, Portugal, and Spain, most major importing countries will show little change in stocks in 1974-75. So far this season purchasing patterns among most importers have been of a "fill-in" nature, a practice which appears likely to continue throughout most of the 1974-75 season unless business activity picks up or production prospects for the 1975-76 marketing year reflect appreciable diversions to attractively priced food crops.

An uptrend in prices throughout much of the 1973-74 marketing year to levels unprecedented since the Civil War was fueled by several factors: Simultaneous spurts in economic activity among many of the world's developed nations that began in 1972-73, textile expansion plans in several developing countries, and uncertainties about prospective supplies of raw cotton as natural disasters and the demands of competing food crops temporarily clouded production prospects last season. Worldwide inflation and the instability of international currency markets also influenced this rise, which saw the price of U.S. Strict Middling (SM) 1-1/16 inch cotton reach 99.50 cents per pound, c.i.f. Northern Europe, on January 17, 1974. The Northern European Index 'A' (an average of the six cheapest of 10 growths of American-type SM 1-1/16 inches) on the same day reached a high of 90.35 cents per pound.

CENTRIFUGAL SUGAR(RAW VALUE) PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1965-66/1969-70; ANNUAL 1970-71/1974-75 1/
(IN THOUSANDS OF SHORT TONS)

| REGION AND COUNTRY | AVERAGE 1965-66/1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 | 1974-75 2/ |
|----------------------------------|----------------------------|---------------|---------------|---------------|---------------|---------------|
| NORTH AMERICA | | | | | | |
| BAHAMAS..... | 8 | 0 | 0 | 0 | 0 | 0 |
| BARBADOS..... | 185 | 151 | 125 | 112 | 196 | 176 |
| BELIZE..... | 64 | 73 | 78 | 79 | 88 | 88 |
| CANADA..... | 151 | 107 | 164 | 161 | 126 | 114 |
| COSTA RICA..... | 145 | 171 | 197 | 192 | 180 | 225 |
| CUBA..... | 6,253 | 6,530 | 4,837 | 5,787 | 6,283 | 6,614 |
| DOMINICAN REPUBLIC..... | 886 | 1,209 | 1,256 | 1,259 | 1,275 | 1,350 |
| EL SALVADOR..... | 132 | 174 | 204 | 207 | 256 | 279 |
| GUADELOUPE..... | 168 | 166 | 88 | 133 | 110 | 65 |
| GUATEMALA..... | 187 | 225 | 259 | 298 | 358 | 385 |
| HAITI..... | 62 | 72 | 71 | 72 | 74 | 72 |
| HONDURAS..... | 54 | 67 | 68 | 65 | 80 | 85 |
| JAMAICA..... | 480 | 437 | 423 | 365 | 422 | 441 |
| MARTINIQUE..... | 43 | 31 | 24 | 25 | 15 | 12 |
| MEXICO..... | 2,610 | 2,729 | 2,778 | 3,053 | 3,142 | 3,307 |
| NICARAGUA..... | 120 | 187 | 183 | 157 | 176 | 203 |
| PANAMA..... | 70 | 95 | 96 | 94 | 115 | 140 |
| ST. KITTS..... | 39 | 28 | 29 | 26 | 29 | 28 |
| TRINIDAD-TOBAGO..... | 247 | 239 | 256 | 207 | 205 | 213 |
| USC CONTINENTAL(BEET)..... | 3,067 | 3,221 | 3,512 | 3,663 | 3,200 | 2,911 |
| USC CONTINENTAL(CANE)..... | 1,212 | 1,253 | 1,206 | 1,620 | 1,419 | 1,518 |
| USM HAWAII..... | 1,200 | 1,286 | 1,119 | 1,129 | 1,039 | 1,144 |
| USW PUERTO RICO..... | 658 | 321 | 298 | 255 | 290 | 300 |
| USW VIRGIN ISLANDS..... | 1 | 0 | 0 | 0 | 0 | 0 |
| TOTAL..... | 18,040 | 18,872 | 17,270 | 18,960 | 19,079 | 19,678 |
| SOUTH AMERICA | | | | | | |
| ARGENTINA..... | 1,092 | 1,001 | 1,092 | 1,426 | 1,819 | 1,639 |
| BOLIVIA..... | 111 | 90 | 130 | 136 | 192 | 193 |
| BRAZIL..... | 4,984 | 5,642 | 6,227 | 6,795 | 7,672 | 8,157 |
| CHILE..... | 168 | 227 | 191 | 184 | 99 | 139 |
| COLOMBIA..... | 666 | 758 | 871 | 898 | 913 | 1,014 |
| ECUADOR..... | 214 | 250 | 276 | 276 | 270 | 303 |
| GUYANA..... | 364 | 413 | 352 | 298 | 403 | 386 |
| PARAGUAY..... | 45 | 62 | 61 | 62 | 80 | 89 |
| PERU..... | 837 | 995 | 1,015 | 1,014 | 1,059 | 1,102 |
| SURINAM..... | 19 | 15 | 12 | 10 | 11 | 11 |
| URUGUAY..... | 61 | 49 | 64 | 83 | 88 | 123 |
| VENEZUELA..... | 426 | 542 | 570 | 565 | 602 | 978 |
| TOTAL..... | 8,986 | 10,844 | 10,860 | 11,746 | 13,209 | 13,835 |
| WESTERN EUROPE | | | | | | |
| AUSTRIA..... | 331 | 358 | 325 | 428 | 408 | 419 |
| BELGIUM-LUXEMBOURG..... | 592 | 726 | 927 | 758 | 873 | 777 |
| DENMARK..... | 338 | 205 | 358 | 377 | 405 | 450 |
| FINLAND..... | 58 | 66 | 69 | 97 | 94 | 94 |
| FRANCE..... | 2,411 | 2,972 | 3,530 | 3,289 | 3,491 | 3,535 |
| GERMANY, WEST..... | 2,112 | 2,264 | 2,584 | 2,440 | 2,760 | 2,756 |
| GREECE..... | 130 | 206 | 170 | 177 | 174 | 197 |
| IRELAND..... | 152 | 165 | 201 | 185 | 208 | 169 |
| ITALY..... | 1,533 | 1,321 | 1,367 | 1,381 | 1,279 | 1,043 |
| NETHERLANDS..... | 751 | 787 | 923 | 833 | 917 | 801 |
| PORTUGAL (AZORES & MADEIRA)..... | 23 | 25 | 20 | 25 | 28 | 26 |
| SPAIN..... | 736 | 806 | 1,070 | 915 | 899 | 754 |
| SWEDEN..... | 261 | 241 | 294 | 250 | 291 | 347 |
| SWITZERLAND..... | 68 | 65 | 84 | 74 | 86 | 83 |
| UNITED KINGDOM..... | 1,049 | 1,085 | 1,301 | 1,135 | 1,155 | 772 |
| TOTAL..... | 10,546 | 11,382 | 13,222 | 12,367 | 13,064 | 12,222 |
| EASTERN EUROPE | | | | | | |
| ALBANIA..... | 17 | 19 | 16 | 21 | 21 | 22 |
| BULGARIA..... | 275 | 250 | 275 | 254 | 292 | 269 |
| CZECHOSLOVAKIA..... | 958 | 850 | 772 | 859 | 827 | 863 |
| GERMANY, EAST..... | 685 | 951 | 573 | 794 | 969 | 882 |
| HUNGARY..... | 500 | 300 | 309 | 335 | 332 | 386 |
| POLAND..... | 1,830 | 1,659 | 1,887 | 2,016 | 2,003 | 1,981 |
| ROMANIA..... | 493 | 420 | 490 | 636 | 698 | 661 |
| YUGOSLAVIA..... | 511 | 390 | 464 | 437 | 532 | 636 |
| TOTAL..... | 5,238 | 4,439 | 4,786 | 5,351 | 5,674 | 5,674 |
| TOTAL EUROPE..... | 19,784 | 15,821 | 18,008 | 17,717 | 18,738 | 17,895 |
| TOTAL U.S.S.R..... | 10,605 | 9,904 | 8,813 | 8,984 | 10,549 | 9,921 |
| AFRICA | | | | | | |
| EGYPT..... | 432 | 450 | 500 | 650 | 716 | 661 |
| ETHIOPIA..... | 79 | 134 | 143 | 159 | 165 | 176 |
| KENYA..... | 83 | 147 | 140 | 111 | 175 | 198 |
| MAURITIUS REPUBLIC..... | 117 | 115 | 121 | 121 | 127 | 121 |
| MAURITIUS..... | 671 | 674 | 688 | 756 | 791 | 745 |
| MOZAMBIQUE..... | 246 | 310 | 357 | 402 | 430 | 441 |
| REUNION..... | 255 | 230 | 201 | 250 | 277 | 241 |
| RHODESIA..... | 203 | 165 | 193 | 220 | 273 | 276 |
| SOUTH AFRICA..... | 1,650 | 1,542 | 2,056 | 2,111 | 1,909 | 2,111 |
| SWAZILAND..... | 160 | 180 | 207 | 188 | 209 | 220 |
| TANZANIA..... | 92 | 103 | 99 | 121 | 131 | 138 |
| UGANDA..... | 161 | 168 | 155 | 98 | 61 | 28 |
| ZAIRE (CONGO,K) | 40 | 50 | 55 | 58 | 67 | 66 |
| OTHER 3/..... | 476 | 601 | 761 | 769 | 848 | 926 |
| TOTAL..... | 4,675 | 4,868 | 5,677 | 6,017 | 6,181 | 6,349 |

CENTRIFUGAL SUGAR(RAW VALUE)^{1/} PRODUCTION IN SPECIFIED COUNTRIES * AVERAGE 1965-66/1969-70, ANNUAL 1970-71/1974-75 2/

(IN THOUSANDS OF SHORT TONS)

| REGION AND COUNTRY | AVERAGE 1965-66/1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 | 1974-75 2/ |
|------------------------------|----------------------------|---------------|---------------|---------------|---------------|---------------|
| ASIA | | | | | | |
| BURMA..... | 89 | 125 | 127 | 132 | 110 | 121 |
| CHINA, PEOPLES REP..... | 1,747 | 2,499 | 2,115 | 2,708 | 2,099 | 2,066 |
| CHINA, REP. OF (TAIWAN)..... | 890 | 916 | 822 | 860 | 983 | 904 |
| INDIA 3/..... | 4,161 | 4,963 | 4,222 | 5,040 | 5,456 | 5,291 |
| INDONESIA..... | 732 | 800 | 750 | 981 | 1,047 | 1,102 |
| IRAN..... | 464 | 424 | 639 | 609 | 734 | 744 |
| JAPAN..... | 429 | 502 | 639 | 716 | 720 | 583 |
| NANSEI-NANPO (RUYUKYU)..... | 232 | 238 | 150 | / | / | / |
| PAKISTAN..... | 543 | 758 | 421 | 518 | 701 | 648 |
| PHILIPPINES..... | 1,790 | 2,270 | 2,061 | 2,673 | 2,914 | 3,052 |
| THAILAND..... | 340 | 504 | 694 | 754 | 1,025 | 1,130 |
| TURKEY..... | 730 | 709 | 1,003 | 894 | 799 | 994 |
| OTHER 4/..... | 123 | 120 | 104 | 200 | 337 | 365 |
| TOTAL..... | 12,269 | 15,108 | 13,029 | 16,165 | 17,727 | 17,801 |
| OCEANIA | | | | | | |
| AUSTRALIA..... | 2,586 | 2,702 | 3,015 | 3,016 | 2,858 | 3,262 |
| FJJI..... | 393 | 421 | 376 | 413 | 386 | 397 |
| TOTAL..... | 2,979 | 3,123 | 3,391 | 3,429 | 3,244 | 3,649 |
| WORLD TOTAL..... | 73,340 | 77,739 | 77,847 | 83,019 | 80,726 | 89,129 |

NOTE: Due to rounding, may not add to area total.

1/ Years shown are crop year of the crop-harvesting season. For chronological arrangement here, all campaigns which begin not earlier than May of one year, nor later than April of the following year, are placed in the same crop-harvesting year. The entire season's production of each country is credited to the May/April year in which harvesting and sugar production began. Refined beet sugar is generally converted to raw value by multiplying by 1.057, while refined cane sugar is multiplied by 1.07 to obtain the raw value equivalent. 2/ Preliminary. 3/ Other Africa includes Afar-I-Sennar, Algeria, Angola, Cameroon, Congo (Brazzaville), Ghana, Liberia, Malawi, Morocco, Nigeria, Senegal Republic, Sudan, Tanganyika, and Zanzibar. 4/ Includes Khanmantal. 5/ Since January 1, 1972, included in Japan. 6/ Other Asia includes Afghanistan, Iraq, Israel, Lebanon, Nepal, South Korea, South Vietnam, Sri Lanka (Ceylon), and Syria. Bangladesh is included in Other Asia beginning in 1971-72.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

NON-CENTRIFUGAL SUGAR^{1/} PRODUCTION IN SPECIFIED COUNTRIES * AVERAGE 1965-66/1969-70, ANNUAL 1970-71/1974-75 2/

(IN THOUSANDS OF SHORT TONS)

| REGION AND COUNTRY | AVERAGE 1965-66/1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 | 1974-75 2/ |
|------------------------------|----------------------------|---------------|---------------|---------------|---------------|---------------|
| NORTH AMERICA | | | | | | |
| COSTA RICA..... | 44 | 46 | 44 | 30 | 44 | 47 |
| EL SALVADOR..... | 20 | 14 | 14 | 11 | 10 | 10 |
| GUATEMALA..... | 47 | 50 | 50 | 60 | 55 | 57 |
| MEXICO..... | 129 | 127 | 125 | 127 | 127 | 129 |
| NICARAGUA..... | 16 | 14 | 13 | 13 | 13 | 13 |
| PANAMA..... | 4 | 2 | 2 | 8 | 2 | 2 |
| TOTAL..... | 267 | 253 | 248 | 248 | 259 | 267 |
| SOUTH AMERICA | | | | | | |
| BRAZIL..... | H.A. | H.A. | H.A. | 220 | 220 | 220 |
| COLOMBIA..... | 726 | 772 | 805 | 744 | 772 | 827 |
| ECUADOR..... | 41 | 44 | 44 | 44 | 44 | 44 |
| PERU..... | 14 | 14 | 14 | 15 | 14 | 14 |
| VENEZUELA..... | 41 | 40 | 39 | 36 | 39 | 44 |
| TOTAL..... | 823 | 870 | 902 | 1,060 | 1,089 | 1,150 |
| ASIA | | | | | | |
| BURMA..... | 160 | 160 | 160 | 157 | 143 | 143 |
| CHINA, PEOPLES REP..... | 760 | 809 | 810 | 816 | 904 | 898 |
| CHINA, REP. OF (TAIWAN)..... | 28 | 29 | 25 | 28 | 29 | 28 |
| INDIA..... | 5,732 | 7,166 | 7,165 | 6,614 | 6,724 | 6,063 |
| INDONESIA..... | 332 | 340 | 294 | 202 | 165 | 193 |
| JAPAN..... | 7 | 4 | 3 | 14 | 13 | 15 |
| NANSEI-NANPO (RUYUKYU)..... | 15 | 15 | 15 | / | / | / |
| PAKISTAN..... | 706 | 772 | 1,323 | 1,543 | 1,820 | 1,943 |
| PHILIPPINES..... | 64 | 51 | 51 | 63 | 66 | 60 |
| THAILAND..... | 198 | 240 | 280 | 298 | 386 | 386 |
| Vietnam, South..... | 23 | 10 | 10 | 11 | 11 | 12 |
| TOTAL..... | 8,026 | 9,598 | 10,095 | 9,764 | 9,961 | 9,341 |
| WORLD TOTAL..... | 9,116 | 10,721 | 11,246 | 11,053 | 11,309 | 10,787 |

NOTE: Due to rounding, may not add to area total.

H.A. = Not available.

1/ Noncentrifugal sugar includes all types of sugar produced by other than centrifugal process which is largely for consumption in the relatively few areas where produced. The estimates include such kinds known as piloncillo, panela, papelon, chancaca, turron, Jaggery, kur, muncowado, panocha, etc. 2/ Years shown are last year's crop-harvesting season. For chronological arrangement here all campaigns which begin not earlier than May of one year, nor later than April of the following year, are placed in the same crop-harvesting year. The entire season's production of each country is credited to the May/April year in which harvesting and sugar production began. 3/ Preliminary. 4/ Since January 1, 1972, included in Japan.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

CENTRIFUGAL SUGAR(RAW VALUE) PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1965-66/1969-70; ANNUAL 1970-71/1974-75 1/
(IN THOUSANDS OF METRIC TONS)

| REGION AND COUNTRY | AVERAGE 1965-66/1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 | 1974-75 2/ |
|----------------------------------|----------------------------|---------|---------|---------|---------|------------|
| NORTH AMERICA | | | | | | |
| BAHAMAS..... | 7 | 0 | 0 | 0 | 0 | 0 |
| BARBADOS..... | 168 | 137 | 113 | 102 | 178 | 140 |
| BELIZE..... | 58 | 66 | 71 | 72 | 80 | 80 |
| CANADA..... | 137 | 97 | 149 | 146 | 114 | 103 |
| COSTA RICA..... | 131 | 155 | 179 | 174 | 163 | 204 |
| CUBA..... | 5,672 | 5,924 | 4,388 | 5,250 | 5,700 | 6,000 |
| DOMINICAN REPUBLIC..... | 804 | 1,097 | 1,139 | 1,142 | 1,157 | 1,234 |
| EL SALVADOR..... | 119 | 158 | 185 | 188 | 232 | 283 |
| GUADELOUPE..... | 152 | 151 | 80 | 121 | 100 | 59 |
| GUATEMALA..... | 170 | 204 | 235 | 270 | 325 | 349 |
| HAITI..... | 56 | 65 | 64 | 65 | 67 | 65 |
| HONDURAS..... | 49 | 61 | 62 | 59 | 73 | 77 |
| JAMAICA..... | 436 | 396 | 384 | 331 | 383 | 400 |
| MARTINIQUE..... | 39 | 28 | 22 | 23 | 14 | 11 |
| MEXICO..... | 2,357 | 2,476 | 2,520 | 2,770 | 2,850 | 3,000 |
| NICARAGUA..... | 109 | 170 | 166 | 142 | 160 | 184 |
| PANAMA..... | 64 | 86 | 87 | 85 | 104 | 127 |
| ST. KITTS..... | 35 | 25 | 26 | 24 | 26 | 25 |
| TRINIDAD-TOBAGO..... | 224 | 217 | 232 | 188 | 186 | 193 |
| US-CONTINENTAL(BEET)..... | 2,782 | 3,013 | 3,186 | 3,323 | 2,903 | 2,641 |
| US-CONTINENTAL(CANE)..... | 1,100 | 1,137 | 1,094 | 1,470 | 1,287 | 1,377 |
| US-HAWAII..... | 1,088 | 1,167 | 1,015 | 1,024 | 943 | 1,138 |
| US-PUERTO RICO..... | 597 | 291 | 270 | 231 | 263 | 272 |
| US-VIRGIN ISLANDS..... | 1 | 0 | 0 | 0 | 0 | 0 |
| TOTAL..... | 16,366 | 17,120 | 15,667 | 17,200 | 17,308 | 17,852 |
| SOUTH AMERICA | | | | | | |
| ARGENTINA..... | 991 | 908 | 991 | 1,294 | 1,650 | 1,467 |
| BOLIVIA..... | 101 | 62 | 118 | 123 | 174 | 175 |
| BRAZIL..... | 4,521 | 5,118 | 5,649 | 6,164 | 6,960 | 7,400 |
| CHILE..... | 152 | 206 | 173 | 167 | 90 | 126 |
| COLOMBIA..... | 605 | 688 | 790 | 815 | 828 | 920 |
| ECUADOR..... | 194 | 227 | 250 | 250 | 245 | 275 |
| GUYANA..... | 330 | 375 | 319 | 270 | 366 | 360 |
| PARAGUAY..... | 41 | 56 | 55 | 56 | 73 | 81 |
| PERU..... | 759 | 903 | 921 | 920 | 961 | 1,000 |
| SURINAM..... | 17 | 16 | 11 | 9 | 10 | 10 |
| URUGUAY..... | 56 | 46 | 58 | 75 | 80 | 112 |
| VENEZUELA..... | 387 | 492 | 517 | 513 | 546 | 615 |
| TOTAL..... | 8,154 | 9,112 | 9,882 | 10,656 | 11,983 | 12,551 |
| WESTERN EUROPE | | | | | | |
| AUSTRIA..... | 300 | 325 | 295 | 388 | 370 | 380 |
| BELGIUM-LUXEMBOURG..... | 537 | 659 | 841 | 688 | 792 | 705 |
| DENMARK..... | 307 | 268 | 325 | 342 | 367 | 408 |
| FINLAND..... | 53 | 60 | 63 | 88 | 85 | 85 |
| FRANCE..... | 2,187 | 2,696 | 3,202 | 2,984 | 3,167 | 3,207 |
| GERMANY, WEST..... | 1,916 | 2,054 | 2,344 | 2,214 | 2,504 | 2,500 |
| GREECE..... | 118 | 187 | 154 | 161 | 150 | 179 |
| IRLAND..... | 138 | 150 | 182 | 168 | 189 | 153 |
| ITALY..... | 1,391 | 1,198 | 1,240 | 1,283 | 1,187 | 946 |
| NETHERLANDS..... | 681 | 714 | 637 | 756 | 832 | 727 |
| PORTUGAL (AZORES & MADEIRA)..... | 21 | 23 | 18 | 23 | 25 | 24 |
| SPAIN..... | 668 | 731 | 971 | 830 | 816 | 684 |
| SWEDEN..... | 237 | 219 | 267 | 227 | 284 | 315 |
| SWITZERLAND..... | 62 | 59 | 76 | 67 | 78 | 75 |
| UNITED KINGDOM..... | 952 | 984 | 1,180 | 1,030 | 1,048 | 700 |
| TOTAL..... | 9,567 | 10,326 | 11,995 | 11,219 | 11,852 | 11,088 |
| EASTERN EUROPE | | | | | | |
| ALBANIA..... | 15 | 17 | 15 | 19 | 19 | 20 |
| BULGARIA..... | 249 | 227 | 249 | 230 | 265 | 235 |
| CZECHOSLOVAKIA..... | 869 | 771 | 700 | 779 | 780 | 765 |
| GERMANY, EAST..... | 594 | 500 | 520 | 720 | 879 | 800 |
| HUNGARY..... | 463 | 272 | 280 | 304 | 301 | 350 |
| POLAND..... | 1,650 | 1,605 | 1,712 | 1,829 | 1,817 | 1,800 |
| ROMANIA..... | 448 | 381 | 445 | 577 | 633 | 600 |
| YUGOSLAVIA..... | 463 | 354 | 421 | 396 | 483 | 577 |
| TOTAL..... | 4,752 | 4,027 | 4,342 | 4,856 | 5,147 | 5,147 |
| TOTAL EUROPE..... | 14,319 | 14,353 | 16,337 | 16,073 | 16,999 | 16,835 |
| TOTAL U.S.S.R..... | 9,621 | 8,985 | 7,995 | 8,150 | 9,870 | 9,000 |
| AFRICA | | | | | | |
| EGYPT..... | 392 | 408 | 454 | 590 | 680 | 600 |
| ETHIOPIA..... | 72 | 122 | 130 | 144 | 150 | 160 |
| KENYA..... | 75 | 133 | 127 | 101 | 159 | 180 |
| MAURITANIA REPUBLIC..... | 106 | 104 | 110 | 110 | 115 | 110 |
| MAURITIUS..... | 608 | 611 | 624 | 686 | 718 | 676 |
| MOZAMBIQUE..... | 223 | 281 | 324 | 365 | 399 | 400 |
| REUNION..... | 240 | 209 | 182 | 227 | 251 | 219 |
| RHODESIA..... | 184 | 150 | 175 | 200 | 248 | 250 |
| SOUTH AFRICA..... | 1,497 | 1,899 | 1,865 | 1,915 | 1,732 | 1,915 |
| SWAZILAND..... | 146 | 163 | 188 | 171 | 190 | 200 |
| TANZANIA..... | 83 | 92 | 90 | 110 | 119 | 125 |
| UGANDA..... | 146 | 152 | 141 | 89 | 55 | 25 |
| ZAIRE (CONGO-KP)..... | 36 | 46 | 50 | 53 | 61 | 60 |
| OTHER 3/..... | 432 | 546 | 690 | 698 | 769 | 840 |
| TOTAL..... | 4,241 | 4,416 | 5,150 | 5,459 | 5,607 | 5,760 |

CENTRIFUGAL SUGAR(RAW VALUE)^{1/} PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1965-66/1969-70; ANNUAL 1970-71/1974-75 ^{2/}
(IN THOUSANDS OF METRIC TONS)

| REGION AND COUNTRY | AVERAGE 1965-66/1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 | 1974-75 ^{2/} |
|------------------------------|----------------------------|---------------|---------------|---------------|---------------|-----------------------|
| ASIA | | | | | | |
| BURMA..... | 81 | 113 | 115 | 120 | 100 | 110 |
| CHINA, PEOPLES REP..... | 1,805 | 2,267 | 1,919 | 2,457 | 2,630 | 2,600 |
| CHINA, REP. OF (TAIWAN)..... | 608 | 831 | 746 | 780 | 692 | 620 |
| INDIA /..... | 3,775 | 4,502 | 3,830 | 4,572 | 4,950 | 4,800 |
| INDONESIA..... | 664 | 726 | 680 | 690 | 950 | 1,000 |
| IRAN..... | 421 | 566 | 580 | 625 | 666 | 675 |
| JAPAN..... | 389 | 455 | 580 | 650 | 653 | 529 |
| NAHSEI-NANPO (RYUKYU)..... | 210 | 216 | 136 | 5/ | 5/ | 5/ |
| PAKISTAN..... | 492 | 608 | 382 | 470 | 636 | 588 |
| PHILIPPINES..... | 1,624 | 2,059 | 1,870 | 2,426 | 2,444 | 2,769 |
| THAILAND..... | 308 | 930 | 630 | 684 | 930 | 1,025 |
| TURKEY..... | 662 | 643 | 910 | 811 | 725 | 902 |
| OTMER 6/..... | 111 | 109 | 167 | 181 | 306 | 331 |
| TOTAL..... | 11,130 | 13,706 | 12,546 | 14,665 | 16,082 | 16,149 |
| OCEANIA | | | | | | |
| AUSTRALIA..... | 2,346 | 2,451 | 2,735 | 2,736 | 2,593 | 2,950 |
| FUJI..... | 357 | 382 | 341 | 375 | 350 | 360 |
| TOTAL..... | 2,703 | 2,833 | 3,076 | 3,111 | 2,943 | 3,310 |
| WORLD TOTAL | 66,934 | 70,524 | 70,622 | 75,314 | 80,492 | 80,857 |

NOTE: Due to rounding, may not add to area total.

^{1/} Years shown are crop year of the crop-harvesting season. For chronological arrangement here, all campaigns which begin not earlier than May of one year, nor later than April of the following year, are placed in the same crop-harvesting year. The entire season's production of each country is credited to the May/April year in which harvesting and sugar production began. Refined beet sugar is generally converted to raw value by multiplying by 1.087, while refined cane sugar is multiplied by 1.07 to obtain the raw value equivalent. ^{2/} Preliminary. ^{3/} Other Africa includes Afars-Isaans, Algeria, Angola, Cameroon, Congo (Brazzaville), Ghana, Liberia, Malawi, Morocco, Nigeria, Somal Republic, Sudan, Tunisia, and Zambia. ^{4/} Includes khandsari. ^{5/} Since January 1, 1972, included in Japan. ^{6/} Other Asia includes Afghanistan, Iraq, Israel, Lebanon, Nepal, South Korea, South Vietnam, Sri Lanka (Ceylon), and Syria; Bangladesh is included in Other Asia beginning in 1971-72.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

NON-CENTRIFUGAL SUGAR^{1/} PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1965-66/1969-70; ANNUAL 1970-71/1974-75 ^{2/}
(IN THOUSANDS OF METRIC TONS)

| REGION AND COUNTRY | AVERAGE 1965-66/1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 | 1974-75 ^{2/} |
|------------------------------|----------------------------|--------------|---------------|---------------|---------------|-----------------------|
| NORTH AMERICA | | | | | | |
| COSTA RICA..... | 40 | 42 | 40 | 27 | 40 | 43 |
| EL SALVADOR..... | 25 | 13 | 13 | 10 | 16 | 16 |
| GUATEMALA..... | 42 | 45 | 45 | 54 | 50 | 52 |
| MEXICO..... | 117 | 115 | 113 | 115 | 115 | 117 |
| NICARAGUA..... | 19 | 13 | 12 | 12 | 12 | 12 |
| PANAMA..... | 3 | 2 | 2 | 7 | 2 | 2 |
| TOTAL..... | 243 | 230 | 225 | 225 | 235 | 242 |
| SOUTH AMERICA | | | | | | |
| BRAZIL..... | N.A. | N.A. | N.A. | 200 | 200 | 200 |
| COLOMBIA..... | 659 | 700 | 730 | 675 | 700 | 750 |
| ECUADOR..... | 38 | 40 | 40 | 40 | 40 | 40 |
| PERU..... | 13 | 13 | 13 | 14 | 13 | 13 |
| VENEZUELA..... | 38 | 36 | 35 | 33 | 35 | 40 |
| TOTAL..... | 746 | 790 | 818 | 982 | 988 | 1,043 |
| ASIA | | | | | | |
| BURMA..... | 145 | 145 | 145 | 142 | 130 | 130 |
| CHINA, PEOPLES REP..... | 689 | 730 | 735 | 740 | 820 | 815 |
| CHINA, REP. OF (TAIWAN)..... | 25 | 26 | 23 | 25 | 26 | 25 |
| INDIA..... | 5,200 | 6,800 | 6,800 | 6,000 | 6,100 | 5,500 |
| INDONESIA..... | 301 | 308 | 230 | 183 | 150 | 175 |
| JAPAN..... | 7 | 4 | 3 | 13 | 12 | 14 |
| NAHSEI-NANPO (RYUKYU)..... | 14 | 14 | 14 | 5/ | 5/ | 5/ |
| PAKISTAN..... | 641 | 700 | 1,200 | 1,400 | 1,379 | 1,400 |
| PHILIPPINES..... | 58 | 46 | 46 | 57 | 60 | 54 |
| THAILAND..... | 180 | 225 | 254 | 270 | 250 | 360 |
| VIETNAM, SOUTH..... | 21 | 9 | 9 | 10 | 10 | 11 |
| TOTAL..... | 7,281 | 8,707 | 9,159 | 8,840 | 9,037 | 8,474 |
| WORLD TOTAL | 8,270 | 9,726 | 10,202 | 10,027 | 10,260 | 9,759 |

NOTE: Due to rounding, may not add to area total.

N.A. = Not available.

^{1/} Noncentrifugal sugar includes all types of sugar produced by other than centrifugal process which is largely for consumption in the relatively few areas where produced. The estimates include such kinds known as piloncillo, panela, papelon, chancaca, radura, jaggery, sur, muscovado, panocha, etc. ^{2/} Years shown are last year's crop-harvesting season. For chronological arrangement here all campaigns which begin not earlier than May of one year, nor later than April of the following year, are placed in the same crop-harvesting year. The entire season's production of each country is credited to the May/April year in which harvesting and sugar production began. ^{3/} Preliminary. ^{4/} Since January 1, 1972, included in Japan.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

HOLASSES, INDUSTRIAL: PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1965-66/1969-70; ANNUAL 1970-71/1974-75 1/
(IN THOUSANDS OF METRIC TONS)

| REGION AND COUNTRY | AVERAGE 1965-66/1969-70 | 1970-71 | 1971-72 | 1972-73 | 1973-74 | 1974-75 |
|------------------------------|----------------------------|---------------|---------------|---------------|---------------|---------------|
| NORTH AMERICA | | | | | | |
| CANADA 2/..... | 64 | 56 | 56 | 63 | 60 | 60 |
| COSTA RICA..... | 39 | 50 | 53 | 56 | 52 | 65 |
| CUBA 3/..... | 1,254 | 1,500 | 1,100 | 1,200 | 1,385 | 1,350 |
| DOMINICAN REPUBLIC..... | 272 | 320 | 314 | 344 | 346 | 367 |
| EL SALVADOR..... | 44 | 62 | 73 | 95 | 97 | 100 |
| GUATEMALA..... | 54 | 69 | 91 | 126 | 138 | 146 |
| HAITI..... | 19 | 21 | 24 | 21 | 24 | 22 |
| JAMAICA..... | 172 | 192 | 159 | 131 | 161 | 165 |
| MEXICO..... | 966 | 1,100 | 1,083 | 1,190 | 1,238 | 1,269 |
| VIGARAGUA..... | 40 | 80 | 79 | 65 | 70 | 78 |
| PANAMA..... | 34 | 27 | 31 | 36 | 37 | 39 |
| TRINIDAD-TOBAGO..... | 91 | 85 | 94 | 92 | 89 | 94 |
| UNITED STATES..... | 1,574 | 1,654 | 1,700 | 1,853 | 1,625 | 1,600 |
| US HAWAII..... | 315 | 297 | 300 | 278 | 260 | 275 |
| USM PUERTO RICO..... | 270 | 203 | 200 | 142 | 165 | 160 |
| OTHER..... | 179 | 200 | 191 | 215 | 195 | 200 |
| TOTAL..... | 5,388 | 5,916 | 5,548 | 5,907 | 5,942 | 5,990 |
| SOUTH AMERICA | | | | | | |
| ARGENTINA..... | 347 | 359 | 390 | 478 | 695 | 618 |
| BRAZIL..... | 1,485 | 1,650 | 1,700 | 1,775 | 1,952 | 2,200 |
| CHILE..... | 36 | 53 | 34 | 34 | 27 | 38 |
| COLOMBIA..... | 163 | 183 | 211 | 212 | 220 | 250 |
| ECUADOR..... | 50 | 60 | 71 | 71 | 72 | 76 |
| GUYANA..... | 138 | 154 | 155 | 114 | 156 | 150 |
| PERU 2/..... | 266 | 292 | 319 | 350 | 370 | 385 |
| URUGUAY..... | 21 | 22 | 21 | 20 | 21 | 36 |
| VENEZUELA 2/..... | 169 | 220 | 247 | 264 | 268 | 275 |
| OTHER..... | 145 | 130 | 150 | 165 | 215 | 200 |
| TOTAL..... | 2,020 | 3,123 | 3,298 | 3,491 | 4,004 | 4,228 |
| WESTERN EUROPE | | | | | | |
| AUSTRIA..... | 72 | 70 | 64 | 70 | 75 | 73 |
| BELGIUM-LUXEMBOURG..... | 129 | 147 | 185 | 164 | 195 | 176 |
| DENMARK..... | 85 | 84 | 100 | 106 | 141 | 140 |
| FINLAND..... | 26 | 30 | 32 | 40 | 31 | 32 |
| FRANCE..... | 562 | 738 | 890 | 991 | 1,220 | 1,200 |
| GERMANY, WEST..... | 488 | 511 | 664 | 629 | 709 | 700 |
| GREECE..... | 18 | 75 | 45 | 56 | 60 | 68 |
| IRELAND..... | 31 | 35 | 41 | 44 | 50 | 40 |
| ITALY..... | 463 | 433 | 435 | 400 | 370 | 300 |
| NETHERLANDS..... | 183 | 214 | 256 | 215 | 200 | 225 |
| SPAIN..... | 209 | 260 | 302 | 236 | 271 | 224 |
| SWEDEN..... | 70 | 74 | 77 | 80 | 86 | 95 |
| SWITZERLAND..... | 14 | 15 | 16 | 17 | 23 | 17 |
| UNITED KINGDOM..... | 313 | 322 | 396 | 322 | 412 | 381 |
| TOTAL..... | 2,664 | 3,008 | 3,503 | 3,370 | 3,834 | 3,671 |
| EASTERN EUROPE | | | | | | |
| HUNGARY..... | 160 | 110 | 105 | 130 | 159 | 170 |
| POLAND..... | 496 | 392 | 454 | 505 | 600 | 610 |
| ROMANIA..... | 124 | 120 | 140 | 185 | 215 | 218 |
| YUGOSLAVIA..... | 146 | 147 | 150 | 164 | 167 | 212 |
| OTHER..... | 484 | 650 | 475 | 525 | 530 | 520 |
| TOTAL..... | 1,411 | 1,819 | 1,324 | 1,809 | 1,671 | 1,710 |
| TOTAL: EUROPE..... | 4,074 | 4,227 | 4,827 | 4,879 | 5,505 | 5,401 |
| TOTAL: U.S., S.R..... | 2,739 | 3,250 | 3,000 | 3,000 | 3,400 | 3,600 |
| AFRICA | | | | | | |
| ANGOLA..... | 17 | 18 | 19 | 18 | 20 | 22 |
| Egypt 4/..... | 173 | 175 | 180 | 190 | 250 | 226 |
| MAURITIUS..... | 147 | 130 | 140 | 155 | 180 | 168 |
| MOZAMBIQUE..... | 71 | 73 | 85 | 100 | 110 | 115 |
| SOUTH AFRICA..... | 390 | 523 | 523 | 550 | 530 | 550 |
| OTHER..... | 370 | 425 | 440 | 475 | 480 | 470 |
| TOTAL..... | 1,169 | 1,344 | 1,387 | 1,488 | 1,570 | 1,547 |
| ASIA | | | | | | |
| CHINA, REP. OF (TAIWAN)..... | .227 | 238 | 192 | .215 | .279 | .260 |
| INDIA..... | 1,180 | 1,620 | 1,200 | 1,696 | 1,700 | 1,685 |
| INDONESIA..... | 199 | 204 | 210 | 220 | 300 | 310 |
| IRAN..... | 101 | 184 | 190 | 205 | 230 | 238 |
| JAPAN..... | .38 | 37 | 174 | 171 | 185 | 184 |
| PHILIPPINES..... | 569 | 681 | 681 | 834 | 951 | 1,050 |
| THAILAND..... | 212 | 260 | 540 | 571 | 785 | 870 |
| TURKEY..... | 156 | 187 | 224 | 205 | 240 | 255 |
| OTHER..... | 755 | 800 | 825 | 850 | 900 | 880 |
| TOTAL..... | 3,416 | 4,181 | 4,236 | 4,967 | 5,970 | 5,739 |
| OCEANIA | | | | | | |
| AUSTRALIA..... | 404 | 495 | 506 | 512 | 569 | 602 |
| Fiji..... | 83 | 85 | 88 | 85 | 90 | 90 |
| TOTAL..... | 517 | 580 | 591 | 597 | 639 | 692 |
| WORLD TOTAL..... | 20,121 | 22,821 | 22,887 | 24,329 | 26,630 | 27,197 |

1/ In each country the year of production is the same as that for centrifugal sugar production. 2/ Calendar year; first year mentioned in heading.
3/ Included hi-test molasses. 4/ May include edible molasses.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source material, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

NEW PUBLICATIONS

CIRCULARS

Cotton

Raw Cotton Exports in August Below Year Earlier Levels (FC 19-74)

Dairy and Poultry

United States Continues to be Net Dairy Product Importer in Fiscal 1974 (FD 4-74)
World Milk Production for 1974 Up Nearly 2 Percent (FD 5-74)

Fruit and Vegetables

Deciduous Fruit, World Production and Trade Statistics (FDAP-1-74)

Grain

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Livestock and Meat

August U.S. Trade in Livestock, Meat, and Meat Products (FLM-MT-74)
World Bovine Hide Production (FLM 11-74)

Sugar and Tropical Branch

World Tea Production Up Slightly in 1974 (FTEA 3-74)
Near Record Coffee Crop for 1974-75 (FCOF 4-74)

Tobacco

World Cigarette Output Gains 3.7 Percent in 1973 (FT 5-74)

Oilseeds and Products

Continued Uptrend in World Production and Trade of Palm Oil and Palm Products (FO 8-74)

FAS M-260 THE DANISH POULTRY MEAT INDUSTRY . . . 25 pp. Denmark, the world's third largest poultry exporter, is an important U.S. competitor and is now a member of the European Community.